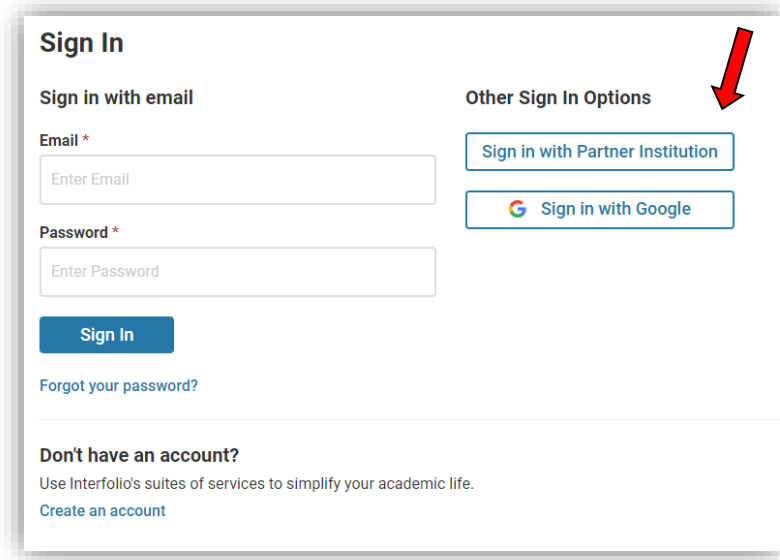
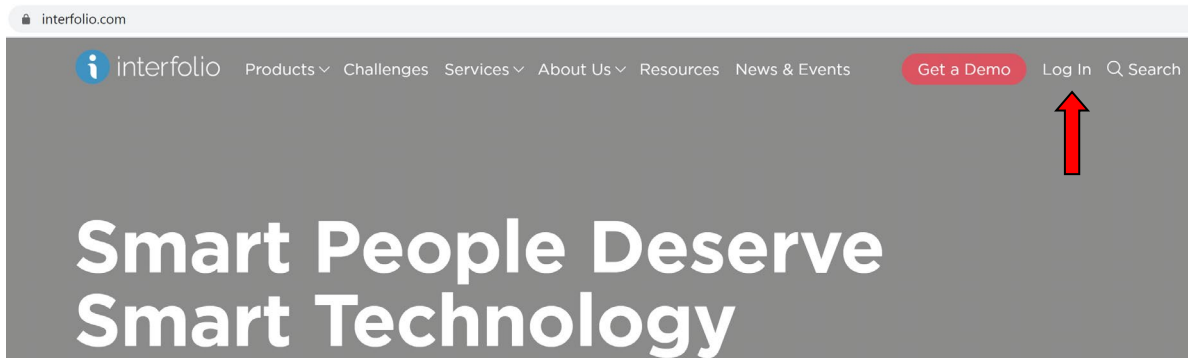


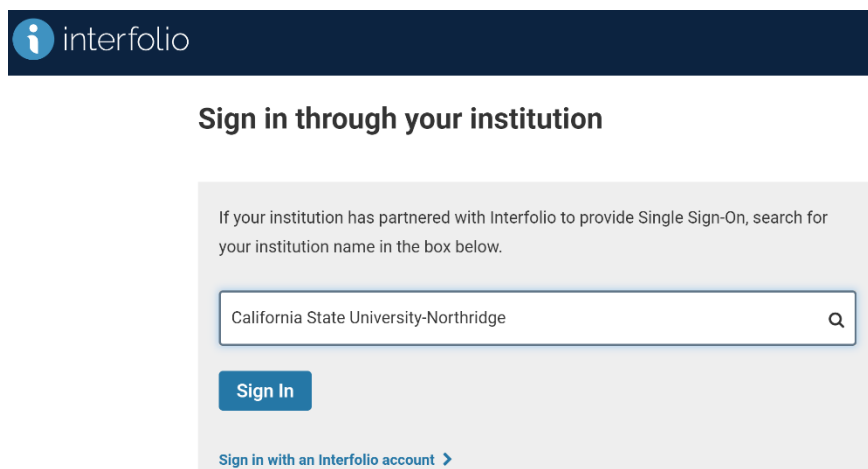
## Reviewers Step-by-Step Guide

To access your assigned cases:

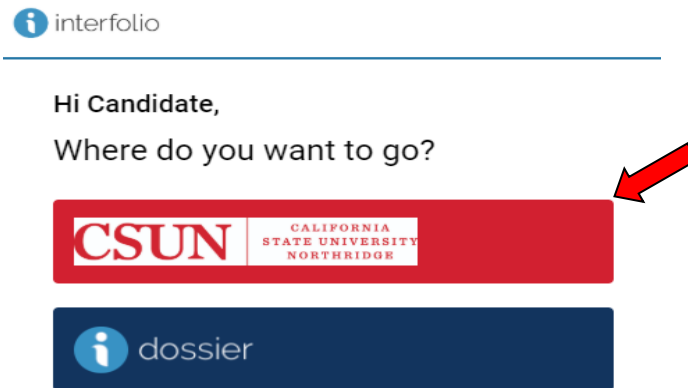
1. Log in to Interfolio.com. Click **Log In** followed by clicking **Sign in With Partner Institution**.



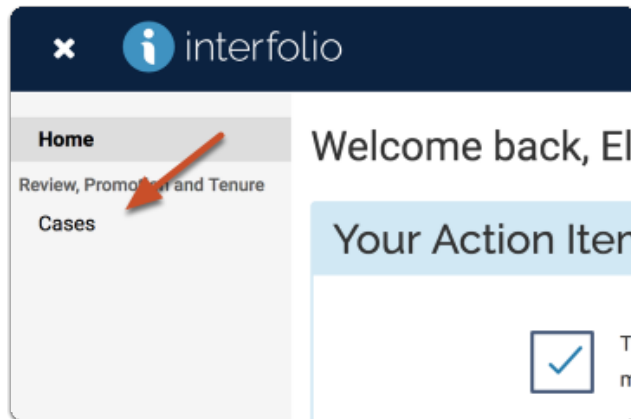
2. Type in Northridge, select the campus name, click **Sign In**, and enter your CSUN portal credentials.



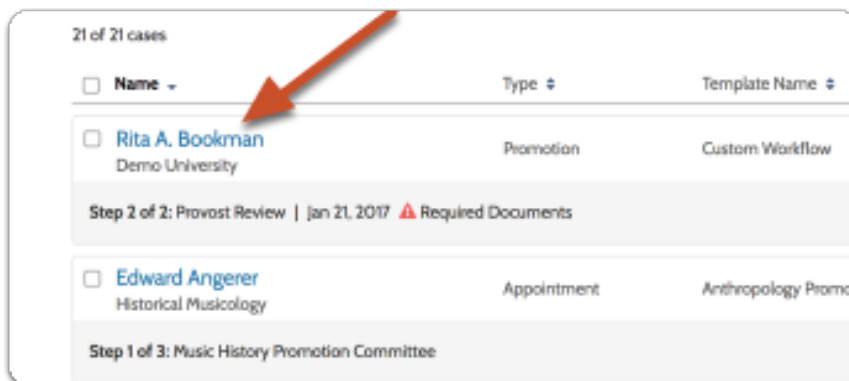
3. Select your **Institutional Account** (CSUN) if needed.



4. Select **Cases** under **Review, Promotion & Tenure** on the left-hand navigation bar.  
**\*Please note:** Sabbatical Cases will still be found under the Review, Promotion & Tenure tab due to Interfolio's design.



5. You will see a list of cases that are available to you. Click the name of the **Candidate** to view case materials (Candidate's Packet includes the ePIF and ePAF materials).



6. The Candidate's Case automatically defaults to the **Case Materials** tab. You may read Sabbatical/DIP leave materials submitted by the candidate and committee members by clicking **Read Case**.

The University of Interfolio > Cases >  
**Michael Bishop**

Unit: Biology      Template: Custom Case      Status:

**Case Materials**    Case Details

Search case materials by title

Expand All     Collapse All   

**Candidate Packet**  
Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

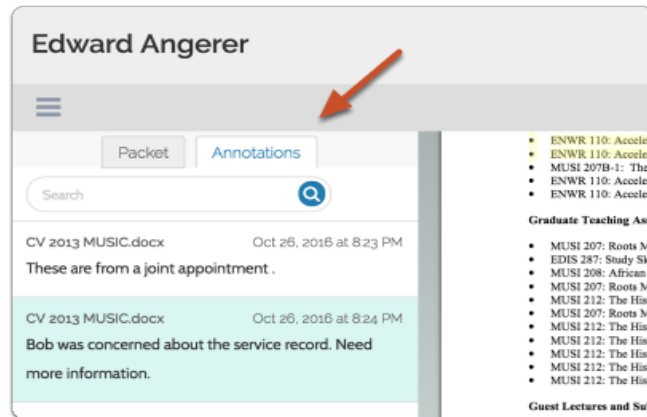
▼ **Candidate Documents** Unlocked

CV 1 required

Title	Details	Actions
<input type="checkbox"/> CV	Submitted by Michael Bishop Jan 15, 2015	

To make Annotations in the materials:

1. You can make notes on materials as you review the file. The **Annotations** are private and can only be viewed by you.



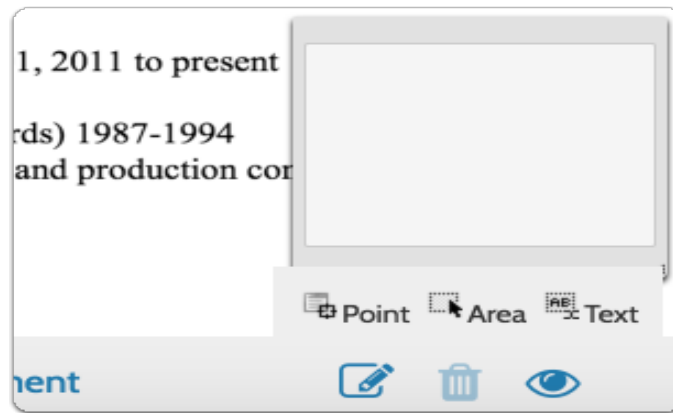
2. Click the **View** icon to toggle on or off the display of annotations.



3. Click the **Note** icon to add an annotation on the currently displayed document.

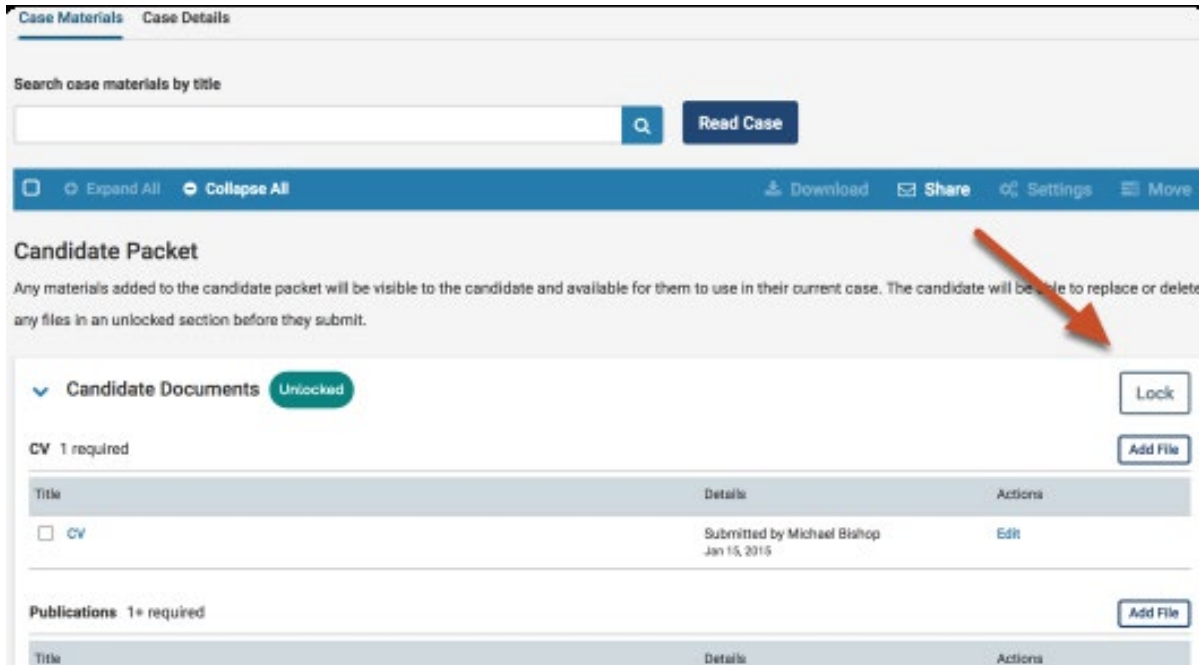


4. After clicking the Note icon, select the type of annotation you want to create:
- Make no selection to add a simple **Sticky** note to the document
  - **Point** adds a note with an arrow pointing to a particular point in the document
  - **Area** adds a note about a selected area
  - **Text** adds a note about highlighted



## Turn On/Off Candidate Editing of Packet Materials:

1. Navigate to the case by clicking the candidate's name in your list of cases (refer to steps 4 and 5 under **To access your assigned cases above**).
2. Click the **Lock** buttons to lock/unlock each of the candidate uploaded materials to enable or disable editing by candidate. Sections of the candidate's packet containing materials can be independently locked or unlocked to allow editing on a section by section basis. Be sure to lock the candidates packet materials by the department review date.



The screenshot shows the 'Case Materials' interface. At the top, there are tabs for 'Case Materials' and 'Case Details'. Below this is a search bar for 'Search case materials by title' and a 'Read Case' button. A blue navigation bar contains icons for 'Expand All', 'Collapse All', 'Download', 'Share', 'Settings', and 'Move'. The main section is titled 'Candidate Packet' and includes a descriptive paragraph. Below this, there are two sections: 'Candidate Documents' (Unlocked) and 'Publications' (1+ required). The 'Candidate Documents' section has a 'Lock' button and an 'Add File' button. It contains a table with one row: 'CV' submitted by Michael Bishop on Jan 15, 2015. The 'Publications' section also has an 'Add File' button and a table header.

Title	Details	Actions
<input type="checkbox"/> CV	Submitted by Michael Bishop Jan 15, 2015	Edit

## Uploading the Personnel Decision Letter, Candidate Rebuttal, and Committee Recommendation:

**Please Note: After the 7 days** of emailing the Personnel Decision letter to the candidate, you are required to upload the **final** Personnel Decision Letter.

1. First, if a rebuttal was provided by the candidate, upload the letter to your appropriate reviewing agency Section located in **Case Materials** tab (case default page) in the **Internal Sections** by clicking **Add File**.

**Internal Sections**

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

**Department Chair** [Edit] [Add File]

**Department Personnel Committee Recommendation** [Edit] [Add File]

Addressing the criteria in Section 600.

DPC Chair

**Materials**

Title	Details	Actions
<input type="checkbox"/> Rebuttal Letter from Candidate	Added by Candidate 1 Jul 26, 2022	Edit

2. Next, click the **Case Details** tab to upload the final Personnel Decision Letter after 7 days from emailing the letter to the candidate.

Under Required Items: click **Add** to upload the Personnel Committee Decision Letter (*and the Candidate's Rebuttal if provided as one document*).

California State University-Northridge > Cases >

## New Candidate

[Send Case] [Case Options]

**Unit:** California State University-Northridge  
**Template:** Leave Application: Sabbatical  
**Status:** ● Test change

Case Materials [Case Details 2] ←

Reviewing as Systems and Ops Management DPC [change]

**Required Items** 2 missing

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

**College Committee Written Evaluation** [Add]

PROVIDE A COPY OF THE WRITTEN EVALUATION TO THE APPLICANT VIA EMAIL NO LATER THAN WEDNESDAY, NOVEMBER 9, 2022. FORWARD THE SABBATICAL LEAVE APPLICATION WITH A COPY OF THE UPLOADED WRITTEN EVALUATION TO THE APPROPRIATE COLLEGE DEAN, NO LATER THAN WEDNESDAY, NOVEMBER 16, 2022.

No files have been added to this section.

**Forms**

Form Name	Assignee	Actions
College Committee Leave Recommendation 1 required questions	Committee Members	Manage Respondents
College Committee Leave Recommendation 1 required questions	Leticia Vargas (You)	Fill Out Form

3. **Next**, click **Fill Out Form** to enter your sabbatical/DIP leave recommendation. For Sabbatical applications, both the DPC and CPC will have to fill out a form. For DIP applications, only the DPC will have to fill out a form (See Fill Out Form instructions below).

4.

California State University-Northridge > Cases >

## New Candidate

Send Case Case Options

**Unit**  
California State University-Northridge

**Template**  
Leave Application: Sabbatical

**Status**  
● Test change

Case Materials Case Details 2

Reviewing as  
Systems and Ops Management DPC change

Required Items 2 missing

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

**College Committee Written Evaluation** Add

PROVIDE A COPY OF THE WRITTEN EVALUATION TO THE APPLICANT VIA EMAIL NO LATER THAN WEDNESDAY, NOVEMBER 9, 2022. FORWARD THE SABBATICAL LEAVE APPLICATION WITH A COPY OF THE UPLOADED WRITTEN EVALUATION TO THE APPROPRIATE COLLEGE DEAN, NO LATER THAN WEDNESDAY, NOVEMBER 16, 2022.

No files have been added to this section.

**Forms**

Form Name	Assignee	Actions
College Committee Leave Recommendation 1 required questions	Committee Members	Manage Respondents
College Committee Leave Recommendation 1 required questions	Leticia Vargas (You)	Fill Out Form

**Please note:** When uploading the letter, be sure to select your review section as there are several options.

### Add Department Recommendation Evaluation

Upload a new file Select file from case

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

**Name \***  
DPC Recommendation Evaluation

**Section \***  
Department Personnel Committee Recommi  
Department Chair  
Department Personnel Committee Recommendation  
College Committee Recommendation  
College Dean

Add Cancel



The **FILL OUT FORM** for Dept. Chairs, Committee Chairs, and Deans

### DEPARTMENT CHAIR FORM

The Department Chair will be indicating if the leave is advisable or not. Should you decide that the leave is inadvisable, please use the box below to provide an explanation. To finalize, click **Submit form**.

#### Department Chair Statement About Impact on Curriculum/Operation

Statement about impact on curriculum/operation of Department: \*

- The leave, if granted, would not seriously disrupt the course offerings of the Department or adversely affect the quality of education offered the students.
- Granting the leave is inadvisable because the leave would create the following potential problems (explain below)

Granting the leave is inadvisable because the leave would create the following potential problems: (explanation)



Last saved on Jul 25, 2022 at 2:09 PM EDT

[Submit Form](#)

[Return to Case](#)



### DEPARTMENT PERSONNEL COMMITTEE (DPC) FORM

The Department Personnel Committee Chair will be selecting one of the options below. To finalize, click **Submit Form**.

#### Department Leave Recommendation

MARK ONE CHOICE ONLY \*

- Outstanding
- Meritorious
- Not recommended

Last saved on Jul 25, 2022 at 2:10 PM EDT

[Submit Form](#)

[Return to Case](#)



## COLLEGE PERSONNEL COMMITTEE (CPC) FORM

Below are the recommendation options for the College Personnel Committee chair. You will be selecting only one choice keeping in mind the number of sabbaticals allocated to your college. To finalize, click **Submit Form**.

*\*\*Please note: If you select Meritorious and recommended, please list the years of sabbatical credit in the box below.*

### College Committee Leave Recommendation

**MARK ONE CHOICE ONLY \***

\*Note: Section 672.2.6. of the Administrative Manual provides, "The College Personnel Committee shall not submit more sabbatical leave applications ranked as outstanding than the total number of sabbatical leaves allocated to that College under Section 672.2.1."

\*\*Note: If the granting of the sabbatical is "inadvisable," there is reason to believe (based upon the assessment of the Department Chair) that the faculty member's absence would adversely affect the curricular offerings and/or operations of the Department.

\*\*\*Note: If the number of sabbatical leave applications judged to be meritorious exceeds the remaining number of sabbatical leaves allocated to the College. Ranking of applications judged by the College committee to be meritorious should be in order of years of sabbatical credit (i.e., years of accrued service since the last sabbatical leave or years of credit towards sabbatical leave if no previous leave has been taken) (see Section 672.2.6.). This rank should be indicated in the space provided above.

Outstanding and recommended\*

Outstanding, but recommendation inadvisable\*\*

Meritorious and recommended\*\*\* (if applicable, please list years of sabbatical credit )

Meritorious but recommendation inadvisable\*\*

Not recommended

Meritorious and recommended: years of sabbatical credit

Last saved on Jul 25, 2022 at 2:15 PM EDT

[Submit Form](#) [Return to Case](#)

## DEAN FORM

The Dean will be indicating if the leave is advisable or not. Should you decide that the leave is inadvisable, please use the box below to provide an explanation. To finalize, click **Submit form**.

### Dean Statement of impact on Department and College

**Statement of Impact on Department and College \***

The leave, if granted, would not seriously disrupt the course offerings of the Department or adversely affect the quality of education offered the students.

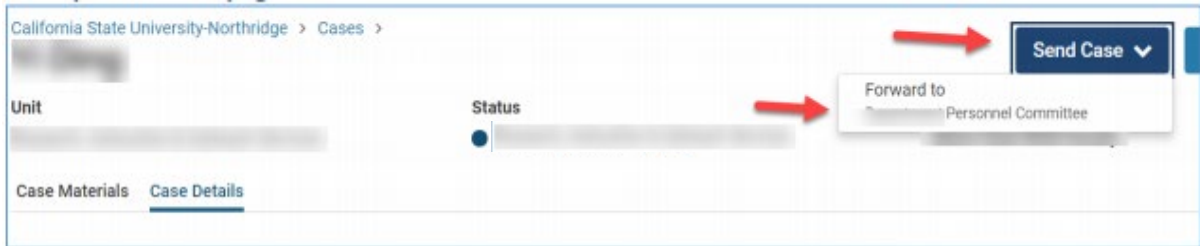
Granting the leave is inadvisable because the leave would create the following potential problems (explain below)

Granting the leave is inadvisable because the leave would create the following potential problems (explanation)

[Submit Form](#) [Save Responses](#) [Return to Case](#)

### Moving the Case Forward to the next Reviewing Agency

1. To move the case forward to the next level of review, scroll to the top of the case page and click on **Send Case** and select the reviewing agency.



2. A template email will then pop up for you to write a message to the next reviewing agency. Type in a subject, email message and lastly click **Continue**. The case will move to the next level for review. (See next page).

